

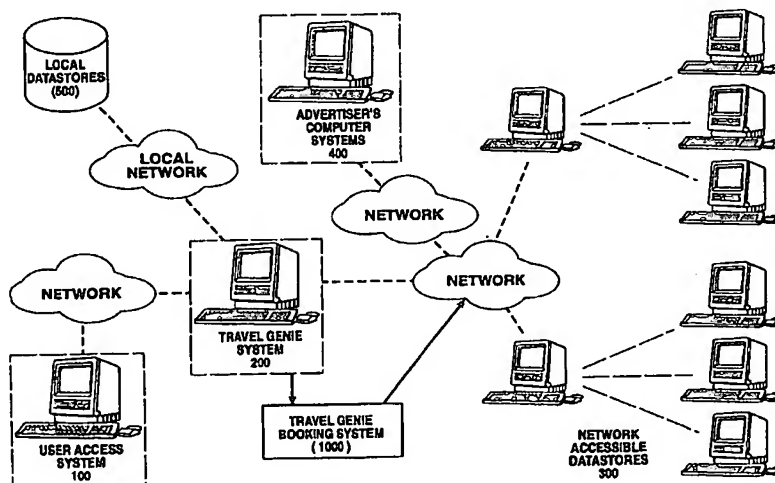
PCT

WORLD INTELLECTUAL PROPERTY ORGANIZATION  
International Bureau

## INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(51) International Patent Classification <sup>6</sup> : <b>H04L</b>	<b>A2</b>	(11) International Publication Number: <b>WO 98/35469</b>
		(43) International Publication Date: 13 August 1998 (13.08.98)
<p>(21) International Application Number: PCT/US98/01341</p> <p>(22) International Filing Date: 23 January 1998 (23.01.98)</p> <p>(30) Priority Data: 08/788,899 23 January 1997 (23.01.97) US</p> <p>(71) Applicant: THE SABRE GROUP, INC. [US/US]; 4255 Amon Carter Boulevard, Fort Worth, TX 76155 (US).</p> <p>(72) Inventors: BULL, David, Stanley; 4025 Timberidge Drive, Irving, TX 75038 (US). CARR, Robert, Neal, Jr.; 6620 Sunny Hill, Watauga, TX 76148 (US). OFFUTT, Joseph, Robert, Jr.; 2758 Mesquite Lane, Grapevine, TX 76051 (US).</p> <p>(74) Agents: GARRETT, Arthur, S. et al.; Finnegan, Henderson, Farabow, Garrett &amp; Dunner, L.L.P., 1300 I Street, N.W., Washington, DC 20005-3315 (US).</p>		<p>(81) Designated States: AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, CA, CH, CN, CU, CZ, DE, DK, EE, ES, FI, GB, GE, GH, GM, GW, HU, ID, IL, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MD, MG, MK, MN, MW, MX, NO, NZ, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TR, TT, UA, UG, UZ, VN, YU, ZW, ARIPO patent (GH, GM, KE, LS, MW, SD, SZ, UG, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, CH, DE, DK, ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, ML, MR, NE, SN, TD, TG).</p> <p><b>Published</b> Without international search report and to be republished upon receipt of that report.</p>

## (54) Title: INFORMATION AGGREGATION AND SYNTHESIZATION SYSTEM



## (57) Abstract

An information aggregation and synthesization system and process. The present invention provides aggregation and packaging of structured or unstructured information from disparate sources such as those available on a network such as the Internet. A network compatible/addressable interface device is operated by a user. The network interface device communicates with local datastores or network accessible datastores via an addressing scheme such as Uniform Resource Locator addresses (URLs) utilized by the Internet. Data passing between the network interface device and the datastores is accessed, polled, and retrieved through an intermediary gateway system. Such aggregated information is then synthesized, customized, personalized and localized to meet the information resource requests specified by the user via the network interface device.

**FOR THE PURPOSES OF INFORMATION ONLY**

Codes used to identify States party to the PCT on the front pages of pamphlets publishing international applications under the PCT.

AL	Albania	RS	Spain	LS	Lesotho	SI	Slovenia
AM	Armenia	FI	Finland	LT	Lithuania	SK	Slovakia
AT	Austria	FR	France	LU	Luxembourg	SN	Senegal
AU	Australia	GA	Gabon	LV	Latvia	SZ	Swaziland
AZ	Azerbaijan	GB	United Kingdom	MC	Monaco	TD	Chad
BA	Bosnia and Herzegovina	GE	Georgia	MD	Republic of Moldova	TG	Togo
BB	Barbados	GH	Ghana	MG	Madagascar	TJ	Tajikistan
BE	Belgium	GN	Guinea	MK	The former Yugoslav	TM	Turkmenistan
BF	Burkina Faso	GR	Greece	ML	Republic of Macedonia	TR	Turkey
BG	Bulgaria	HU	Hungary	MR	Mali	TT	Trinidad and Tobago
BJ	Benin	IE	Ireland	MN	Mongolia	UA	Ukraine
BR	Brazil	IL	Israel	MR	Mauritania	UG	Uganda
BY	Belarus	IS	Iceland	MW	Malawi	US	United States of America
CA	Canada	IT	Italy	MX	Mexico	UZ	Uzbekistan
CF	Central African Republic	JP	Japan	NE	Niger	VN	Viet Nam
CG	Congo	KE	Kenya	NL	Netherlands	YU	Yugoslavia
CH	Switzerland	KG	Kyrgyzstan	NO	Norway	ZW	Zimbabwe
CI	Côte d'Ivoire	KP	Democratic People's	NZ	New Zealand		
CM	Cameroon	KR	Republic of Korea	PL	Poland		
CN	China		Republic of Korea	PT	Portugal		
CU	Cuba		Kazakhstan	RO	Romania		
CZ	Czech Republic	LC	Saint Lucia	RU	Russian Federation		
DE	Germany	LI	Liechtenstein	SD	Sudan		
DK	Denmark	LK	Sri Lanka	SE	Sweden		
EE	Estonia	LR	Liberia	SG	Singapore		

INFORMATION AGGREGATION AND SYNTHESIZATION SYSTEM  
CROSS REFERENCE TO RELATED APPLICATION

This application is a continuation-in-part of U.S. Patent Application No. 08/685,805 filed July 24, 1996, which is based on Provisional Application No. 60/015,384 entitled INFORMATION AGGREGATION AND SYNTHESIZATION SYSTEM, filed April 1, 1996.

BACKGROUND OF THE INVENTION

1. Field of the Invention.

The present invention is directed to an information aggregation and synthesization system which connects with local and network accessible datastores through an intermediary gateway system.

2. Prior Art.

Widespread use of personal computers, modems (modulator/demodulator devices that enable data to be transmitted) and data connections has allowed the growth of computer networks. The Internet serves as an example of a type of computer network, and indeed, is a large network of networks, all inter-connected, wherein the processing activity takes place in real time. The Internet offers mail, file transfer, remote log in and other services. The World Wide Web (WWW) is the fastest growing part of the Internet.

On the World Wide Web (WWW), a technology called hypertext allows Internet addressable resources to be connected, or linked, to one another.

In the past, certain, limited aspects, of the present invention have been proposed, such as monitoring of computer usage.

Lockwood (U.S. Patent No. 5,309,355) provides a computerized tool to augment sales and marketing capabilities of travel agency personnel. The system creates and displays customized sales presentations from (1) stored client profiles; (2) travel agent assessment of

client profiles; and (3) computerized reservation system responses to client profiles. Selected factors are analyzed by the operating program based upon an organization hierarchy of specifications.

Lockwood differs from the present invention in:

1) Data sources - Lockwood uses content from both a videodisk (static) and computerized reservation systems (dynamic). The present invention is capable of deriving content from totally dynamic sources on the World Wide Web (including Internet and local datastores or caches simulating a WWW component).

2) Client Profiles - Lockwood proposes that these be input by a Travel Agent. In the present invention, profiles are entered by the consumer (explicit) or collected through analysis of online session activity (implicit).

3) Data Organization - Lockwood uses preindexed videodisks. The present invention indexes prequalified WWW sites, updating these as they change or as users expand their WWW searches.

4) Programation - Lockwood places the entire index of information in a PROM. This index is exercised by the sequencer which displays a sales presentation. The present invention stores indices in magnetic medium but retrieval and presentation of the indexed information is executed dynamically on premises upon user input.

Remillard (U.S. Patent No. 5,404,393) discloses an electronic device and method for monitoring television activity and communicating the monitored activity to a facility and initiating appropriate actions. A controller initiates an automated configuration by acquiring configuration information. The controller monitors television channel selection information and assembles the monitored television information into a user profile. An option includes capturing images or text and forwarding to the user through a mail facility.

Remillard differs from the present invention in that it suggests a device to access distant information through a television set. The present invention utilizes network addressable information resource and human interface elements such as those used by the Internet, one of which may in fact be attached to a TV. Remillard's invention (or that of others) may be used as a means to acquire WWW information but does not contemplate the present invention.

Levinson (U.S. Patent No. 5,404,505) provides information in a database which is tagged with indices to form an hierarchical structure. Software having a set of subscriber requests handling routines interacts with a data filter subsystem. The data filter subsystem receives incoming data stream and selects those packets that meet certain selection criteria. A special smart caching routing is provided for anticipating future requests by the user.

Levinson differs from the present invention:

- 1) Levinson proposes a satellite based information retrieval system. This is based on fixed data sources (CompuServe, Prodigy) being queried by a user on a telephone line with the results being returned via a television connection. The present invention uses a similar infrastructure to return requested information to the user but our process for identifying content that is relevant is software agent based and retrieval of dynamic content is from the WWW vs. fixed data sources. The present invention can use any means: for example, TV, Cable Modem, RF, ISDN, Modem, fixed line (T-2, T-3 etc.).

- 2) Levinson would establish user inputted profiles for "Automatic Data Retrieval". The present invention supplements user provided profile information by constructing implicit profile recognition patterns, based upon historical search activity.

- 3) Levinson's invention does not specify any of the six components proposed in the present invention.

Griffin et al. (U.S. Patent No. 5,422,809) provides an information storage and retrieval system for storing, referencing and retrieving various travel information from a database. A querying device queries the user for input used to define the field for the travel destination desired. Statistical records are produced which provide relevant information relating to travel destinations using the system. Information is thus provided which can be used to evaluate the popularity of particular destinations.

Griffin et al. differs from the present invention in that it discloses a kiosk system and the processes and subprocesses for self service travel planning and reservations. While the present invention provides similar capability using other means, the six features of the present invention are not disclosed in this patent.

Senda (U.S. Patent No. 5,459,859) discloses an information providing system using a communication network which stores attribute/scheduled information from each subscriber and uses that information to match with other subscribers.

Senda differs from the present invention in that it is a software based system for meeting a system while traveling. It involves a best fit match between profiles. The present invention also provides a "best fit" but between software agents and data being viewed. Senda has both formatted selection and source data inputted for a specific purpose (to meet someone). The present invention uses software agents to format selection data but the source data is unformatted from the WWW.

Belove et al. (U.S. Patent No. 5,491,820) discloses a storage transmission mechanism for retrievable items and may be used on the Internet. The system may include a filter on each client or on the server between the user and the Internet.

Belove et al. differs from the present invention in that it is a client server object caching system. Except for the pruning mechanism that limits the information

cached at the client side, there is no resemblance to the present invention.

Accordingly, it is a principal object and purpose of the present invention to provide an information aggregation and synthesization process and system connecting a network operable device and a plurality of local or network accessible datastores wherein data passing there between is accessed, polled and retrieved through an intermediary gateway system.

#### SUMMARY OF THE INVENTION

The present invention includes at least six different aspects or functional components which are related, all involving use of a computer accessible data network such as the Internet. While the individual aspects may be utilized together, they may also be used separately.

The user initiates access to the system through a network addressable interface device (such as a personal computer, Internet Appliance, an interactive television or even a personal digital assistant or smart telephone). The user is then connected to the information aggregation and synthesization system via a network service provider (most likely through the Internet or some variation). The user logs on to the system either by name, address, or with some pseudonym (or some combination). This allows the user's activity to be tracked and establishes a log of the user's activity during the current online experience (session). The user is also asked for explicit profile information concerning preferences. These preferences will be used to narrow the information retrieval and may be collected when the user first logs in or incrementally as the user asks for specific information. This profile information will be kept and updated as the individual user's preferences change.

Once the user is logged in, the information aggregation and synthesization system will facilitate the user's access to local information or information distributed on a network (this network could be a local

area network or a wide area network such as the Internet). All user access to information is through the system.

This information is topically oriented (Germany travel, the Olympics, Spring Break or even new cars), composed of files and file references using the Hypertext Markup Language ("HTML") or similar tagged reference format that may be prescreened for relevance and appropriateness. Selected text can be "expanded" at any time to provide other information. These words are, thus, linked to other documents. This information is indexed in this fashion in advance of the user's logging in.

A gateway is provided into the WWW for shopping while retaining the user passing through the information aggregation and synthesis system. A gateway is provided to poll, access and retrieve information from various locations. A filtering process is provided and the resulting information is returned to the requested party.

The user is presented with a variety of search, display and output options. The search options include: 1) Search using key words or combinations; 2) Use of complex software text search agents that have been predefined by the information aggregation and synthesis system site operators. These agents take advantage of the expansive subject matter expertise in understanding which search parameters will best serve the user's search needs; 3) Use of search patterns and agents from this user's previous sessions, perhaps expanded by available specials and promotions; 4) Natural Language Query; and 5) Some combination of 1), 2), 3) and 4).

The user selects information to be viewed from the results of the search. This information is retrieved from its source and presented to the user in the manner and at the time requested. The available display options include but are not limited to: display on the user's network capable device, personal TV channel, customized Internet page, custom CD-ROM, electronic mail, mobile devices (Personal Digital Assistants, telephones and pagers) and



facsimile. Information retrieval and display can be text, still pictures, videos, Interactive multimedia, audio and geographic.

In certain situations, data from the datastores destined for the user is converted prior to delivery to the user. The data stream returned to the user may be modified to fit the bandwidth, character set and display limitations of the network and may be modified to meet the limitations of the user interface device.

Along with displays, including those for data entry, searches, search results, information retrieval, the user will be presented with advertisements and/or coupons based on criteria entered by advertisers. This criteria may take the form of simple logic, linking an ad/coupon with a display or be derived from complex software text search agents that analyze one or more of the following: The user's looking pattern, the user's psychographic profile, the user's personal profile, the availability of the advertiser's/couponer's goods or services at the instant in time that the criteria is being exercised. The placement of the ad/coupon will be logged along with user profile information and provided to the advertiser/couponer in some form of report.

During a user session or when a user completes a session, the user's looking activity is analyzed for patterns, preferences and trends and the profile annotated or updated so that when they next use the information aggregation and synthesization system, the nominated searches will be customized to their individual desires.

The six aspects of the information aggregation and synthesization system are:

I. URL Munging

The World Wide Web ("WWW") is characterized by computer (user) connection through an Internet Service Provider to any WWW address or site. Hence, use of the WWW is like placing individual telephone calls to many merchants, trying to compare products and services. URL

Munging is the process that allows the goods and services of many merchants to be displayed through a single virtual shopping center.

This involves encapsulating and indexing the content of various merchants as well as modifying parts of the internal structure, repurposing and redirecting it to be integrated into the information aggregation and synthesis process. This allows content from and access to multiple merchants to be aggregated, synthesized and accessed at a single WWW site.

## II. WWW CD-Rom

World Wide Web ("WWW") access from homes is often constrained by the lack of sufficient data communications bandwidth within a typical residential infrastructure (WWW information may be accessed through the Internet WWW, a local Internet WWW, or a local database or cache simulating a WWW component).

The Internet user will select World Wide Web (WWW) content for retrieval using a search engine to return selected WWW references. The user will then select certain of these references to be included in a custom CD which will be burned or recorded onto a CD and then sent by express delivery to the user.

## III. Software Agent Advertising Insertion.

Currently, advertisements in WWW pages are tightly tied to each page, are inserted based on keywords or on a psychographic profile of the user.

Certain criteria will be entered which delineates a pattern that is requested to be monitored. When this pattern is seen (or is in close match) in the user's WWW activity, the insertion mechanism is activated. If a certain web page is requested, the present invention will display a particular advertisement. The ad will be inserted based on the content of the existing web page being read. An analysis of the text stream of the user's interactive session will be performed on-line. For instance, if the user accesses web pages for Holiday Inns

on the West Coast, the insertion mechanism could be established to automatically insert ads for Hilton Inns on the West Coast.

#### IV. Automated Profile Generation.

Presently, user's profiles are collected based on explicit entry by the user, and extraction from demographic data collected from a variety of sources.

In the present invention, the searching patterns of the user on the Internet are monitored. A set of software text agent profiles is developed and may be integrated with explicitly collected profile information. The automated profile generation will have both explicit profile information gathering and implicit profile information gathering capabilities.

As the user uses the information aggregation and synthesization system, the pattern of information being viewed is analyzed. During a user's session, advanced text analysis tools are used in real-time to understand the interests of the user by synthesis of the text stream of pages looked at. This synthesis is used as input to a statistical correlation with similar interests of a larger population. The results of this correlation are used to predict the extended interests of the user. These are matched using intelligent software text agents and a variety of reasoning techniques. The user is presented with search ideas as well as promotions and specials from suppliers based on these searching patterns.

#### V. Automated Lead Generation

Currently, leads are generated by recording user's WWW site selection. (For Example, user's visiting a "Chicago" information site would be "Chicago" leads.)

In the present invention, the user WWW viewing patterns are recorded. These and optionally the user's profile are matched against software text agents entered by a supplier. When these agents match a pattern/profile, the

## SUBSTITUTE SHEET (RULE 26)

In the embodiments described herein and accompanying figures, a travel information scenario is depicted. It will be understood that the present invention is capable of performing similarly for other venues, such as mortgages,

### DETAILED DESCRIPTION

Information aggregation and synthesis system sources. new product offerings which would be added to the provided to potential suppliers who would in turn develop aggregation and synthesis system operators and persistent agents will also be analyzed by the information instances, provide the information directly. The set of information that was requested is available or in some electronic mail, text page, voice, pager) that the alert the user through a variety of means (facsimile, to monitor future information additions to the system and user's session is over). complex software text search agent then can establish a persistent (stays around after the in the form of a product, a service or an event. The user information not yet available. This information could be in the course of a session, the user may desire gather "negative" leads.

leads to a company. Thus, the system will be able to who could not only prepare a travel package but sell the Texas, this information could be sold to a tour provider hundred people inquire about snorkeling off the coast of developed to identify new markets. As an example, if one user initiated requests. From this, a profile will be This will be done by recognizing unanswered queries and/or intuitively construct a profile from user inputted data. are unmet by the WWW content retrieved. The invention will from user usage of the Internet on what consumer queries in the present invention, records will be maintained

system to analyze unmet needs of Internet users. Currently, there is no on-line immediately accessible VI. Software Agent Unmet Needs Generation.

matched, the supplier is notified. supplier is notified. When this profile is approximately

automobile sales and any other interactive exchange of information sought by information content seekers and potentially satisfied by information content providers.

#### **Initial Setup For User**

Referring to the drawings in detail, Figure 1 illustrates a diagram showing the interface of the present system 200 with a user on a user access system 100 and various data sources. Figure 2 illustrates several of the datastore categories. The use of the present invention has at least five phases:

Initial Setup For User

Initial Setup For Advertisers and Lead Generation

Ongoing Maintenance

User Session

Post Session Activity

A theme or definition of a class of information (e.g., central California travel and tourism or new automobiles) is identified. Data sources (Local DataStores (500...N) and Network Accessible DataStores (300...N)) are screened for relevance, quality of information and appropriateness (or may be included de facto based on their title or description). These are indexed using a text indexing software tool 2981 and the indices stored on the system index DataStore 220. An initial set of Preestablished Software Text Agents are defined. These agents are words or combinations of words that form a word based search pattern. This initial set of agents is relevant to the searches that might be performed against the class of information that was indexed. (i.e., Agents about automobiles would be developed to search a class of indexed information about new cars). These are stored in the Preestablished Software Text Agent DataStore 231. The System 200 uses any multipurpose computer central processing units with the ability to handle multiple inputs and outputs with the necessary hard disk storage and to run World Wide Web (WWW) or other network server software.

SUBSTITUTE SHEET (RULE 26)

Figure 1A illustrates a modified arrangement of the interface of the present system 200 with alternate user access systems and alternate network interface devices. The present system 200 is in communication with a limited band width limited character set system (LBLCS) 289 which is a subsystem of input/output system 280. Although today's WWW access is normally with broad band, high speed networks, many corporate intranets operate on limited capability, slow speed networks. The LBLCS system 289 allows conversion of the rich media used on today's WWW into text-only media with multi-media references as anchors that preserve the essential information to be passed in HTML or other tagged reference format to the user. For users with limited band width limited character set networks, the WWW datastore information which is returned to the user is altered. Any graphics files are identified, eliminated and replaced with a text anchor. For example, certain networks or user access systems can not handle graphics files. A text page which is returned to the user 110 or 120 which contains graphic files will be identified. The graphic file itself will be eliminated and in its place a text reference, such as "(picture)", is inserted.

User access system 110 is connected through a limited private network to the LBLCS 289 subsystem. Figure 1b illustrates a block diagram of the LBLCS subsystem. User interface system 120 illustrates a connection through a limited dial network into the LBLCS subsystem 289.

The return datastream from the datastores to the user is modified to fit the bandwidth, character set and display limitations of the network and of the user access device. In one implementation of the present system, terminals for travel agents may be provided with access to the system 20. In certain cases, travel agent terminals are much more limited than ordinary personal computer CPU's. Through the usage of present invention, agents will be provided access

to the information aggregation and synthesization system 200.

#### **Initial Setup For Advertisers and Lead Generation**

##### **Advertisers:**

Advertisers, using a user access system 100 enter criteria that should be met for an advertisement/coupon placement. These criteria are in the form of the complex software text search agents described above. This includes a match "threshold". When this threshold is met or exceeded, an ad/coupon will be appended to a system session. Statistical analysis known as clustering is used to evaluate the data.

The ad/coupon may be resident on the user access system 100, an advertiser's computer system (400...N) or stored in the Advertising DataStore 250. Additionally, the Advertiser may include conditional criteria for ad/coupon placement (available inventory, in stock levels, excess capacity, etc.). This criteria is referenced when the "threshold" is met and if satisfactory, the ad/coupon is appended. This criteria may be tested against data input through the user access system 100, data on the advertising DataStore 250 or data on the advertiser's computer system (400...N). Additionally, advertisers can input World Wide Web (WWW) referential information (hot links) to be displayed with ads/coupons or on geographic map displays. These are stored on the advertising Datastore 250.

##### **Lead Generation:**

Lead Purchasers, using a user access system 100 enter criteria that should be met for the generation of a lead. These criteria are in the form of the complex software text search agents described above. This includes a match "threshold". When this threshold is met or exceeded, information about the current user and the information being viewed is stored in the lead DataStore 270 for variable output transmission to the lead purchaser.

## Ongoing Maintenance

### Index Updating:

Local Datastores (500..N) and network accessible Datastores (300..N) will change randomly and will become out of synchronization with the system index Datastore 220. The data monitoring system 2982 will periodically monitor local Datastores (500..N) and network accessible Datastores (300..N) and when there is a change, update the index Datastore 220.

### Data addition:

Operators will add data to the local Datastores (500..N) and users using a user access system 100 will nominate data from the network accessible Datastores (300..N) to be added to the index Datastore 220. Operators will update the indices using the data indexing service 2981 if the data passes the screening outlined in the initial setup for users above.

### User Session

- ☐ Login and Profiles
- ☐ Browsing
- ☐ Data Retrieval
- ☐ User Interrupt
- ☐ Ad/Coupon Insertion
- ☐ Persistent Agents

### Login and Profiles:

Users using a user access system 100 access the information aggregation and synthesis system 200 through the Internet or other public or private network. The user either logs in by name or by pseudonym or from data previously stored in the user access system 100. New users create an account on the user profile Datastore 210. Previous users are identified to an existing account. The user is presented with a variety of options to create or update profile information in the user profile Datastore 210. This involves a single data entry option or many mini-options based on the browsing activity.



**Browsing:**

The user is also presented with browsing options based on: activity from a previous session in the browsing activity DataStore 240; predeveloped software text agents and personalized software text agents (developed in the Post Session Activity) stored in the Personal Search Text Agent DataStore 232; or combinations of all as well as situational opportunities developed by the user greeting subsystem 291. The user selects the search options to be used (or simply enters search criteria directly). This search criteria is used to search the index DataStore 220 and a list of data sources is presented to the user for selection. The user indicates the information to be viewed. The user will also be presented with options to refine his search through the altering of search agent criteria (Search Reduction System 293).

**Data Retrieval:**

The requested data is retrieved either from local DataStores (500...N) or network accessible DataStore (300...N) and presented to the user via the session management system 292. The user may jump to data referenced in the presented data. Subject to the appropriate policies of the site operation, the session management system 292 will further retrieve and present this data to the user. The user may request that data be overlaid on a geographic display using the Geographic Display I/O System 287 so that referenced information may have geographic relevance.

**User Interrupt:**

The user interrupt system 294 will periodically notify the user of specialized software text agents that they may want to pursue. These Agents are stored in the agent DataStore 230 and are derived by the real time session analysis system 295 which monitors the browsing activity DataStore 240 during the user's session.

#### Ad/Coupon Insertion:

During the session, ads/coupons are inserted alongside displayed data (text, picture or index displays) from the ad DataStore 250, based on ad/coupon insertion agents 233 and inserted by the session management system 292. A Record of Insertion along with appropriate user information (may be general or precise to the name of the user) is stored in the advertising activity DataStore 260.

#### Persistent Agents:

At any time, the user may establish a persistent software Text Agent (using the persistent agent entry system 297, stored in the unmet needs agent DataStore 234) with criteria, if met sometime in the future, will cause the user to be notified through the I/O System 280. These can be explicit or implicit query parameters.

#### Post Session Activity

Periodically, either due to a preset time interrupt, or user or advertiser event driven activity, the following can occur:

- ☐ Unmet Needs Analysis
- ☐ Advertising Report
- ☐ Profile Updating
- ☐ Lead Report
- ☐ Targeted Output
- ☐ Output Activity

#### Unmet Needs Analysis:

Users using the user access system 100 will be able to establish persistent (stays in the system after the user quits using the system) software text agents which describe some criteria, which, if met, will cause them to be notified. These are stored in the unmet needs agent DataStore 234. These unmet needs agents 234 are analyzed using the unmet needs analysis system 299 and reports are created through the I/O System 280 for suppliers who could potentially meet those needs.

**Advertising Report:**

Information about each Ad/Coupon appended to an information aggregation and synthesization system along with known information about the user is stored in the advertising activity DataStore 260. This is reported out periodically to the advertisers/couponers using the I/O System 280.

**Profile Updating:**

During a session or after a user discontinues use, the data viewed (recorded in the browsing activity DataStore 240) is analyzed by the session profile update 2921 and the user profile DataStore 210 is updated with keywords or personal search text agent DataStore 232.

**Lead Report:**

Periodically, the Software Text Lead Agents stored in the lead generation agent DataStore 235 are used to analyze the data viewed (recorded in the browsing activity DataStore 240) and reports prepared for lead purchasers using the I/O System 280.

**Targeted Output:**

Users through the user input system 100 will be able to designate information to be output and the format that the I/O System 280 will use.

**Output Activity (Using the I/O System 280):**

All output systems will provide for the addition of specials, ads and/or coupons.

**Options are:**

Personalized Page 281 - This will create a page accessible through the WWW where the user can access requested information.

SMTP Electronic Mail 282 - This allows the delivery of user requested information using the SMTP capability of the Internet and other popular electronic mail systems.

CCITT Class 3 or Class 4 Facsimile 283 - This allows user requested data to be formed as a printed page and sent via Fax to a Fax receiver of the user's choice.

Voice output direct or to a Voice Mail Box 284 - This translates the user requested data to audio, connects to the user or their voice mail system and transmits the audio.

Personal TV or video feed 285 - This formats the data in a form compatible with transmitted video and allows viewing on demand.

Custom CD-ROM 286 - This places the requested data, indices, viewers and all necessary software on a user Unique CD-ROM for physical delivery.

Geographic Display I/O System 287 - This allows the user to view content geographically, to look at the geographic proximity of merchants and services and provides a vehicle for ads and hot links.

Mobile/Portable System 288 - This allows specially formatted Genie information to be displayed or translated for a wide variety of mobile and portable devices. Identification of Key System Components by reference numerals:

- 100 User Access System
- 110 Limited private network user access system
- 120 Limited dial network user access system
- 200 System comprised of:
  - 210 User Profile Database
  - 220 Travel Genie Index Database
  - 230 Agent Database
- 231 Prestablished Software Text Agents
- 232 Personal Search Text Agents
- 233 Ad/Coupon Insertion Agents
- 234 Unmet Need Agents
- 235 Lead Generation Agents
- 240 Browsing Activity Database
- 250 Advertising Database
- 260 Advertising Activity Database
- 270 Lead Database

- 280 I/O System
  - 281 Personalized Page Output System
  - 282 SMTP Electronic Mail System
  - 283 CCITT Class 3 or Class 4 Facsimile
  - 284 Voice Output
  - 285 Personal TV or Video Feed
  - 286 Custom CD-ROM
  - 287 Geographic Display I/O System
  - 288 Mobile/Portable Device System
  - 289 Limited Bandwidth Limited Character Set System
- 290 Operations System
  - 291 User Greeting System
  - 292 Travel Genie Session Management System
  - 2921 Session Profile Update
  - 293 Search Reduction System
  - 294 User Interrupt System
  - 295 Real Time Session Analysis System
  - 296 Ad/Coupon Insertion System
  - 297 Persistent Agent Entry System
  - 298 Data Support Systems
  - 2981 Data Indexing Service
  - 2982 Data Monitoring System
  - 299 Unmet Needs Analysis System
- 300 Network Accessible DataStores
  - 301...N
- 400 Advertiser's Computer Systems
  - 401...N
- 500 Local DataStores
  - 501...N

100 User Access System

This is a network addressable interface device, such as a conventional personal computer capable of initiating and maintaining a network connection and sending, receiving and displaying data including a digitized data visual representation device such as a monitor and auxiliary

storage, such as a floppy disk drive. It may also be a TV set, smart telephone or network appliance with similar capabilities. It will maintain a connection through a modem (a modulator/demodulator device) that enables data to be transmitted and received.

200 Datastores

Figure 2 illustrates Datastores utilized as a part of the invention. The information aggregation and synthesis system includes:

210 User Profile Datastore

This contains data about the user, preferences, situational preferences, accounting information, psychographic profile, personal profile and other relevant information related to the user by individual identifier.

220 System Index Datastore

This is the index of data accessible by the system. It is established initially and updated as data changes or new data sources are added. It is queried by Agents from the Agent Datastore 230 or by key words.

230 Agent Datastore

231 Preestablished Software Text Agents

These are complex software text search patterns predefined by the site subject matter experts using their extensive knowledge of information contained within the site's indices.

232 Personal Search Text Agents

These are complex software text search patterns that may be individual words or word sets and/or combinations of words and preestablished Software Text Agents 231 including the results of the post session analysis 2921 that provide individually customized searching of the Index Datastore 220.

233 Ad/Coupon Insertion Agents

These are complex software text search patterns that when matched within the text being reviewed within a given session, cause an advertisement/coupon to be added into the display. These can be direct insertion or conditioned from criteria on the Advertiser's Computer Systems (400...N) and/or the user's profile from the user profile DataStore 210.

234 Unmet Need Agents

These are complex software text search patterns created by the user to persist after the end of the user session looking for patterns and/or specific events or data that are observed within the System 200 at some future time.

235 Lead Generation Agents

These are complex software text search patterns that when matched within the text being reviewed within a given session, causes an addition to the Lead DataStore 270 for output to the lead purchaser using the I/O System 280.

240 Browsing Activity DataStore

This is the record of the "looking" activity of each user in each session.

250 Advertising DataStore

This is the storehouse of ads to be presented when a match is made by the Ad/Coupon Insertion Agent 233

260 Advertising Activity DataStore

This is the record or ads presented by the Ad/Coupon Insertion System 296 and information about the user seeing the ads from the Browsing Activity DataStore 240 and the user profile DataStore 210

- 270 Lead Datastore
- When a Lead Generation Agent 235 makes a match, Data about the user from the user profile Datastore 210 and the Browsing Activity Datastore 240 is stored here.
- 280 I/O System
- These are the various ways that output can be channeled, for the user, the advertiser or the lead purchaser.
- 281 Personalized Page Output System
- This allows output text and associated objects to be formatted for general or selective viewing through any system using Hypertext Markup Language (HTML), VRML (Virtual Reality Modeling Language) or other network compatible display based language either locally or over a network.
- 282 SMTP Electronic Mail System
- This allows output text for whatever purpose to be formatted in a format compatible with the SMTP (Simple Mail Transport Protocol) and transmitted to a designated addressee.
- 283 CCITT Class 3 or Class 4 Facsimile
- This allows output text and associated objects for whatever purpose to be formatted to be compatible with the CCITT Class 3 or Class 4 Fax standard and transmitted to a designated fax receiver.
- 284 Voice Output
- This allows output text for whatever purpose to be formatted into voice for transmission to a human receiver or a voice mail box.
- 285 Personal TV or Video Feed
- This allows output text and associated objects for whatever purpose to be formatted as a TV signal (any international standard) to be accessed and replayed using local or network



capability at the request of an individual user (or a class of users).

286 Custom CD-ROM

This allows the user to designate certain data to be placed onto a CD-ROM along with all necessary search and viewing software as well as non user requested ads and promotions.

287 Geographic Display I/O System

This allows data requested by the user to be overlaid on a geographic reference system (a map).

288 Mobile Device System

This allows output to be formatted for a variety of devices including but not limited to: pagers, personal digital assistants, mobile computing devices and other wireless devices.

289 Limited Bandwidth, Limited Character Set (LBLCS) Data Network

The software module input/output system identifies graphic files, removes them and replaces them with text anchors. The LBLCS module may be resident on the I/O system 280 or be established on separate hardware.

290 Operations System

291 User Greeting System

This is the subsystem that identifies users, customizes search screens, incrementally collects explicit profile information and formulates search agent screens and search specials which may be situational or seasonal or both.

292 Session Management System

This tracks and records a user's browsing activity, sets ID tokens, establishes accounts, translates anonymous users to named users and

manages the user's implicit profile information.  
 2921 Session Profile Update  
 Uses the Browsing Activity Datastore 240  
 records, to analyze and update the user's profile  
 in the user profile Datastore 210.  
 293 Search Reduction System  
 This aids the search by suggesting changes  
 to the complex software text search agents to  
 refine the user's search.  
 294 User Interrupt System  
 Based on the Real Time Session Analysis of  
 the users looking activity (stored in 240),  
 determines associated references, agents or other  
 information to be offered to the user and  
 interrupts the user's session with an interactive  
 data screen.  
 295 Time Session Analysis System  
 This monitors the user's browsing activity  
 and analyzes the apparent interests to trigger  
 the user interrupt system 294.  
 296 Ad/Coupon Insertion System  
 This looks at the current display requested  
 by the user with a Ad/Coupon Insertion Agent 233,  
 determines which ads should be placed (or  
 rotated) and makes the placement (or establishes  
 the rotation).  
 297 Persistent Agent Entry System  
 This is the mechanism whereby the user  
 enters the Unmet Need Agent 234. This agent  
 monitors text and data changes and if the  
 requested data/pattern occurs, the user is  
 notified via the I/O System 280.  
 298 Data Support Systems  
 2981 Data Indexing Service  
 This is the facility that indexes  
 designated Datastores (either Network  
 Accessible Datastore (300...N) or Local

DataStores (500...N) upon operator input or periodically and stores these indices in the Index DataStore 220.

2982 Data Monitoring System

This facility, periodically or on demand, checks indices stored in the Index DataStore 220 against actual data (either Network Accessible DataStore (300...N) or Local DataStores (500...N)) and if it has changed, queues for operator review or updates indices.

299 Unmet Needs Analysis System

This analyzes the persistent agents for common patterns or specific requests that can be custom tailored. The results are outputted through the I/O System 280.

300 Network Accessible DataStores

301...N

These are an infinite number of network data sources that are included in the scope of the information aggregation and synthesization. These are represented by (300...N)

400 Advertiser's Computer Systems

401...N

These are DataStores established by advertisers to store ads/coupons to be presented or to set additional conditions for display.

500 Local DataStores

501...N

These are similar to the 300 series but locally vs. wide area network accessible.

Each of the six aspects of the present invention will be discussed in detail.

I. URL Munging

The present invention becomes a gateway to network data content provided by others. The present

SUBSTITUTE SHEET (RULE 26)

The user of a network addressable interface device will select World Wide Web (WWW) data content for retrieval using a search engine to return selected WWW references. The user will then select and designate certain of these references to be included

II. WWW - CD ROMS

device.  
the network and the limitations of the user access bandwidth, character set and display limitations of network 289. The datastream is modified to fit the returned to the user will pass through the LBLCS limited character set data network, the datastream when the invention is utilized on a limited bandwidth, variety of network addressable interface devices. The present invention may be utilized with a wide connect to the requested site through the system 200. types it in a browser's search request, the user will Accordingly, when the user clicks on a URL (or the user will see a direct path to the distant site. "WWW.travelgenie.com?WWW.anywhere.com", even though "WWW.anywhere.com" is converted to through the present invention. As an example, that any hyper linking to another WWW site always goes are indexed by the present invention or "munged" so The URLs embedded in each page that pass through times passing through the present invention 200. requested data to the user from the Datastore, at all retrieval request. This then permits return of the present invention when the user executes a modified or "munged" so that retrieval must go through Resource Locator or URL) to be used. The URL will be The user will select a page (designated by a Uniform connect with a local or network accessible Datastore. device such as the user access system 100, will The user, through a network addressable interface an intermediary gateway system.  
invention directs access which is controlled through

in a custom CD-ROM which will be burned or recorded onto a compact disc and then sent by express delivery to the user.

The user will designate pages and other WWW data content including but not limited to HTML files, audio files, still images and other graphic files from the WWW. Through the session management system 292, selected material will be designated and retrieved. The retrieved data will be included in a custom CD-ROM produced by a service bureau and then sent by a delivery service to the user. Figure 5 shows a process flow diagram.

Optionally, the designated data may be communicated to the user via automated telephone means, may be communicated to a user via electronic replication, or may be copied on to auxiliary computer storage such as through a floppy disk drive.

### III. Software Agent Advertising Information

Advertising is provided which benefits the user while optimizing the advertiser's expenditure by only presenting ads or coupons (or ads and coupons in a rotation if multiple ads/coupons qualify) that are pertinent to that particular user.

Certain criteria will be entered which delineates a pattern that is requested to be monitored. When this pattern is seen (or is in close match) in the user's WWW activity, the insertion mechanism is activated. If a certain web page is requested, the present invention will display a particular advertisement. The ad will be inserted based on the content of the existing web page being read. An analysis of the text stream of the user's interactive session will be performed on-line. When certain text patterns are observed (or close matches are observed), an advertisement is inserted into the display.

The advertising may be static or connected to the advertiser's computer DataStore which designates

During a user's session, advanced text analysis tools are used in real time to understand the interests of the user by synthesis of the text pages looked at. This synthesis is used as input for statistical correlation with similar interests of a

support the user's future shopping sessions. are merged to develop software text agents that queries to the user. The explicit and implicit data information. The explicit information is gathered by may be integrated with explicitly collected profile A set of software text agent profiles is developed and Internet are monitored by monitoring the text stream. The searching patterns of the user on the of the text stream.

session. This is accomplished by statistical analysis references, merchandise or services during the current information for future sessions as well as suggesting information to assist the user in narrowing down integrated with explicitly collected profile develop a set of software text agent profiles that are The looking patterns of the user are monitored to Automated Profile Generation.

Figure 7 illustrates a flow diagram for the these patterns update profiles automatically.

Browsing patterns of the user are analyzed and IV. Automated Profile Generation

ads for "Hilton Inns on the West Coast". mechanism would be established to automatically insert "Holiday Inns on the West Coast", the insertion As an example, if the user accesses web pages for a pattern that needs to be monitored.

merchant in the agent data store 230 which delineates The software agent criteria is entered by the software agent advertising insertion.

Figure 6 illustrates a flow diagram for the other conditions which may be required.

specific ads or coupons based on the pattern match and

larger population. The results of this correlation are used to predict extended interests of the user. These are matched using intelligent software text agents and a variety of reasoning techniques including case based reasoning and fuzzy logic to establish a recommended list of search ideas, promotions and specials. The use of collaborative filtering may also be employed. As an example, if the text analysis indicates that the user has looked at downhill and cross-country skiing, past usages from a larger population may indicate that the user will also be interested in ice skating.

As seen in Figure 7, real time analysis of data is illustrated at box 295. The real time session analysis is in communication with the user interrupt system 294 so that the session may be interrupted at an appropriate point. At the same time, a post session profile update 2921 will update profiles based on browsing activity from a past session and thereafter stored in user profile DataStore 210.

V. Automated Lead Generation

It is known that suppliers will pay for information gathered about user's specific interests. When tied to a specific user, these become "leads" that a supplier can use for off-line follow up. The automated lead generation aspect will analyze a user's profile and session looking activity against a profile established by a supplier. When this profile is approximately matched, the supplier is notified so it can contact the user to offer goods or services. Statistical analysis using complex software text agents is used to determine the match.

Figure 8 illustrates a flow diagram of the lead generation.

In the present invention, the user's WWW viewing patterns are monitored. These and optionally the user's profile 210 are matched against software text

understood that other and further modifications, apart from relation to the drawings attached hereto, it should be Whereas, the present invention has been described in customer.

system as a mechanism to notify the potential will build new products and services and then use the information may be extracted and sold to suppliers who thus be able to gather "negative" leads. This developed to identify new markets. The system will initiated requests. From this, a profile will be recognizing unmet or unanswered queries and/or user profile from user inputted data. This will be done by The invention will intuitively construct a 292 a threshold will be established on the user need. information. Through the session management system An example would be a tour, a price or some other the object of their search occurs at some future time. for, a "watcher" agent may be set up to advise them if If the user does not find what they are looking Figure 9 illustrates a flow diagram.

content retrieved. networks on what consumer queries are unmet by the WWW maintained from user usage of the Internet and other In the present invention, records will be VI. Software Agent Unmet Needs Generation

transmission to a lead purchaser. the lead DataStore 270 for variable output threshold is met or exceeded, information is stored in of complex software text search agents. When this generation of a lead. These criteria are in the form 100, will enter criteria that should be met for the notified. Lead purchasers, using a user access system profile is approximately matched, the supplier is the supplier is notified. Additionally, when this 230. When these agents match a pattern or profile, agents entered by a supplier in an agent DataStore



those shown or suggested herein, may be made within the spirit and scope of this invention.

What Is Claimed:

1. An information aggregation and synthesis process, which process comprises:  
operating a network addressable interface device by a user;  
communicating between said network addressable interface device and a plurality of local or network accessible DataStores through network specific addressing means; and  
accessing, retrieving and processing data passing between said network capable device and said DataStores through an intermediary gateway system.
2. An information aggregation and synthesis process as set forth in Claim 1 wherein said network specific addressing means includes Uniform Resource Locators (URLs).
3. An information aggregation and synthesis process as set forth in Claim 1 wherein said network addressable interface device includes a computer central processing unit, a network data conversion device, a visual data representation device, a user input device and network communication software.
4. An information aggregation and synthesis process as set forth in Claim 3 wherein said network addressable interface device includes auxiliary storage means.
5. An information aggregation and synthesis process as set forth in Claim 1 including the step of analyzing text contained within data retrieved from each said DataStore passing through said intermediary gateway system.
6. An information aggregation and synthesis process as set forth in Claim 5 wherein said analyzed text is modified and redirected by said intermediary gateway system using a tagged reference format.
7. An information aggregation and synthesis process as set forth in Claim 1 wherein said step of

retrieving and processing data passing between said network capable device and said datastores includes the additional step of identifying graphic material in said data retrieved from said datastores and replacing said graphic material with a text anchor.

8. An information aggregation and synthesization process, which process comprises:

operating a network addressable interface device by a user;

communicating between said network capable device and a plurality of local DataStores or network accessible datastores through network specific addressing means;

analyzing of returned text stream from said datastores; and

retrieval from an advertising datastore and insertion of advertising/coupons based upon a threshold matching of a predetermined criteria based on said text stream analysis.

9. An information aggregation and synthesization process as set forth in Claim 8 wherein said network specific addressing means includes Uniform Resource Locators (URLs).

10. An information aggregation and synthesization process as set forth in Claim 8 wherein said analyzing is performed through an intermediary gateway system.

11. An information and aggregation and synthesization process as set forth in Claim 8 including the additional step of identifying graphic material in data returned from said datastores and replacing said graphic material with a text anchor.

12. An information aggregation and synthesization process, which process comprises:

operating a network addressable interface device by a user;

communicating between said network capable device and a plurality of local datastores or network accessible datastores through network specific addressing means;

SUBSTITUTE SHEET (RULE 26)

gathering of explicit information from said user and gathering of implicit information to develop a user profile; and  
developing software text agents based on said information gathered.  
13. An information aggregation and synthesis process as set forth in claim 12 wherein said network specific addressing means includes Uniform Resource locators (URLs).  
14. An information aggregation and synthesis process as set forth in claim 12 wherein said implicit information is gathered by monitoring and analyzing of text streams returned from said databases.  
15. An information aggregation and synthesis process as set forth in claim 14 wherein said text stream analysis is performed by statistical analysis and collaborative filtering.  
16. An information aggregation and synthesis process as set forth in claim 12 including the additional step of identifying graphic material in data returned from said databases and replacing said graphic material with a text anchor.  
17. An information aggregation and synthesis process, which process comprises:  
operating a network addressable interface device by a user;  
communicating between said network capable device and a plurality of local databases and network accessible databases;  
analyzing text contained within data retrieved from each said database;  
establishing text data criteria to be met stored in a database;  
determining a matched threshold for said text data criteria; and  
communicating information from said matched threshold about said user to a lead purchaser.

18. An information aggregation and synthesization process as set forth in Claim 17 including preparing a lead report from said information about said user.

19. An information aggregation and synthesization process, which process comprises:

- operating a network addressable interface device by a user;

- connecting between said network capable device and a plurality of local datastores and network accessible datastores;

- establishing software text agent criteria stored in a datastore;

- analyzing text contained within data from each said datastore;

- determining a threshold match between said software text agent criteria and said datastores;

- offering information to a third party to meet unmet needs identified; and

- providing notification of search satisfaction to said user.

20. An information aggregation and synthesization process as set forth in Claim 19 including the additional step of recognizing unmet user queries or user initiated requests.

21. An information aggregation and synthesization process, which process comprises:

- operating a network addressable interface device by a user;

- communicating between said network capable device and a plurality of local datastores or network datastores through network specific addressing means;

- analyzing of text stream of said datastores;

- accessing, polling and retrieving data passing between said network capable device and said datastores through an intermediary gateway system;

- retrieval from and insertion of advertising/coupons from an advertising datastore based

upon a threshold matching of a predetermined criteria based on said text stream analysis;

gathering of explicit information from said user and gathering of implicit information to develop a user profile;

providing information about said user to a lead purchaser; and

providing information to a third party to meet needs identified.

22. An information aggregation and synthesis process as set forth in Claim 21 wherein said network specific addressing means includes Uniform Resource Locators (URLs).

23. An information aggregation and synthesis process as set forth in Claim 21 wherein said analyzing is performed through an intermediary gateway system.

1 / 9

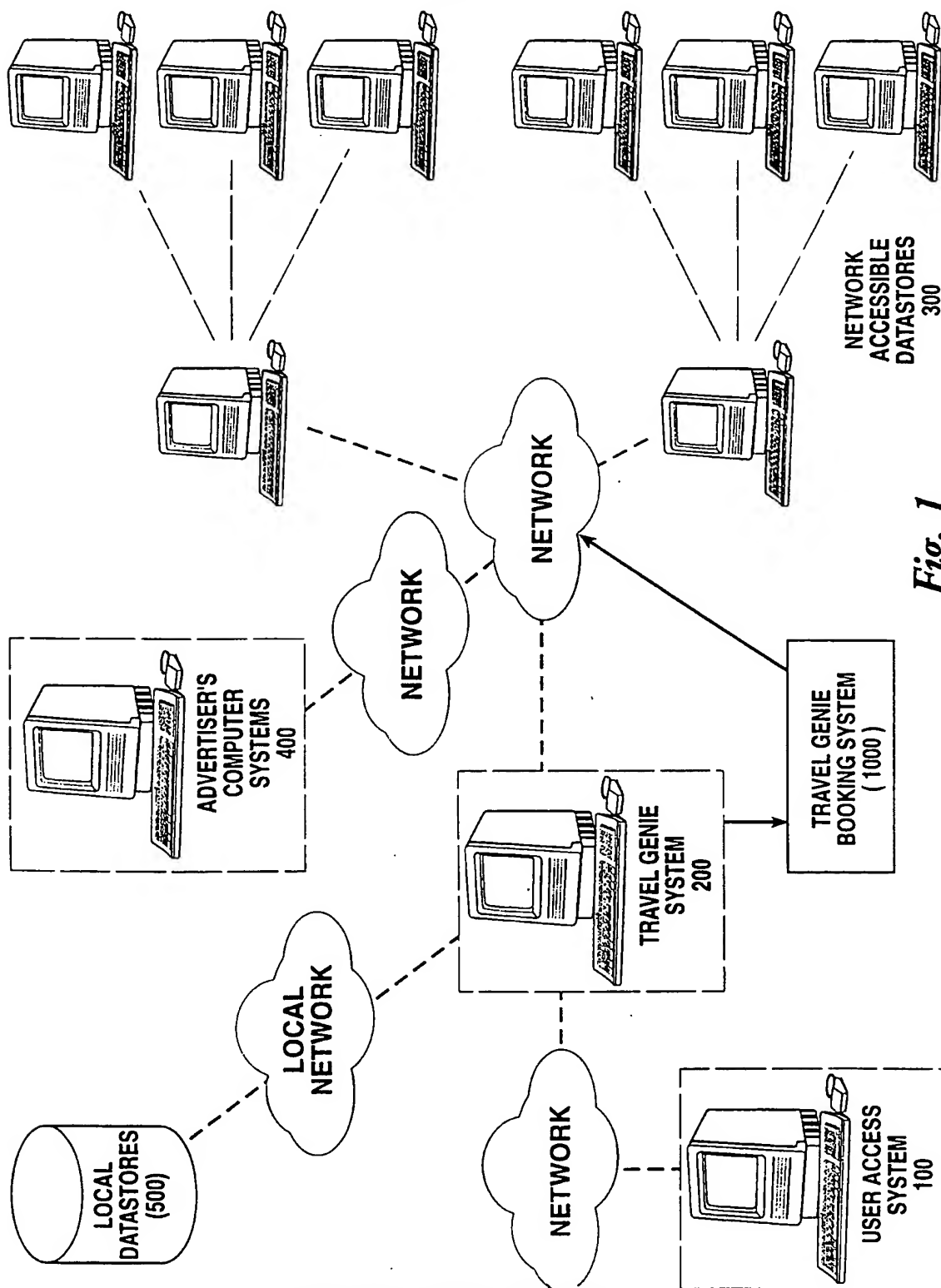


Fig. 1

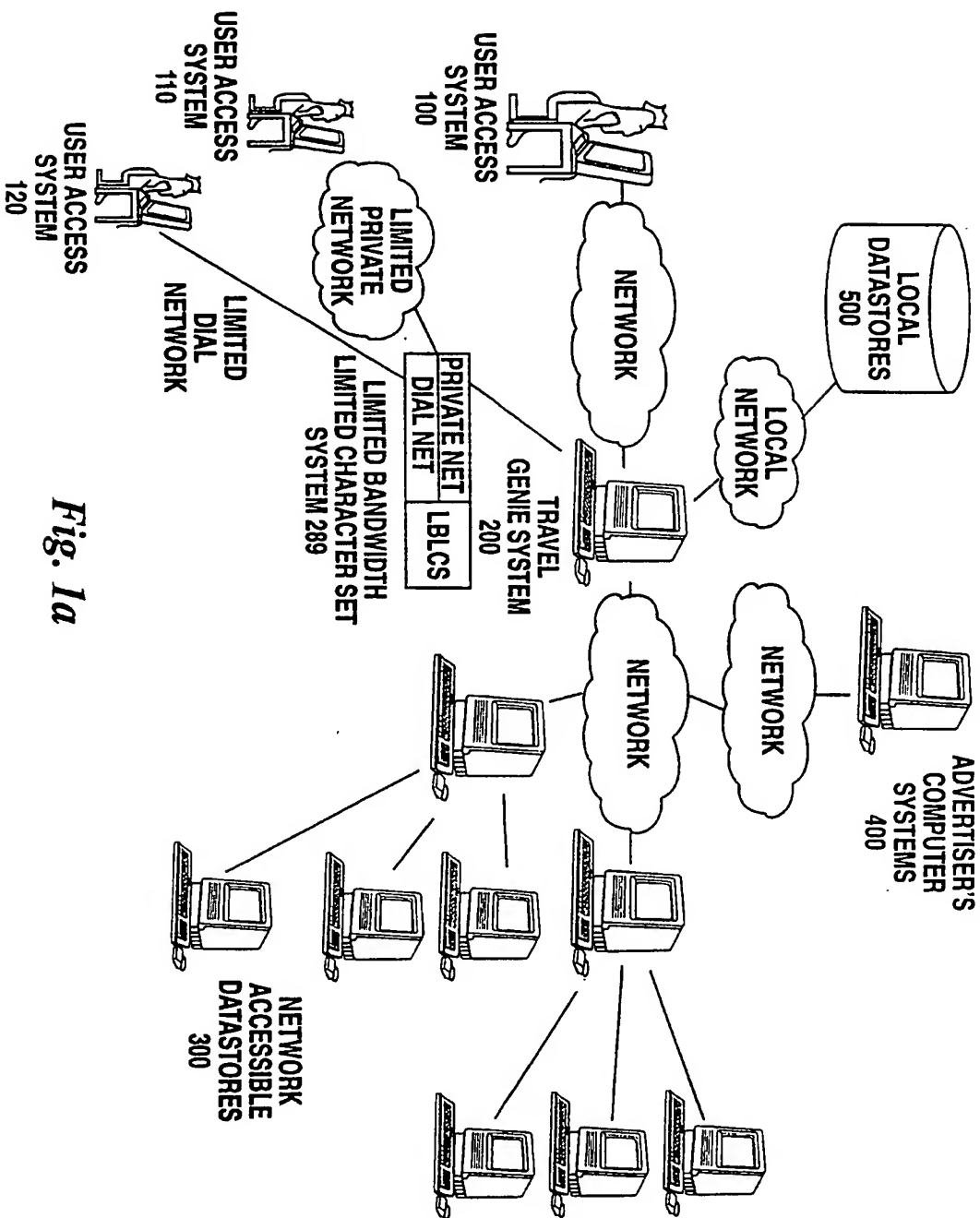
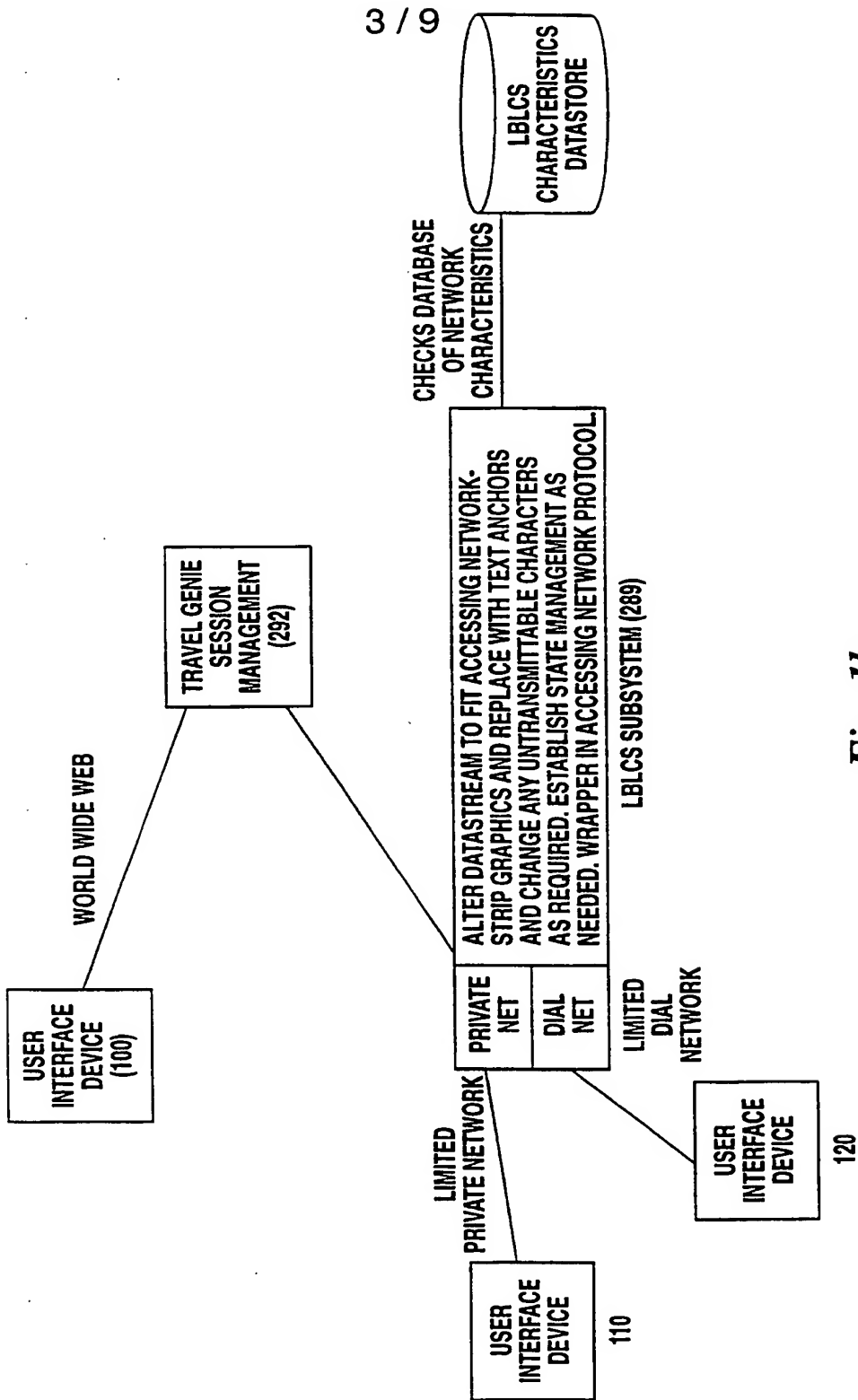


Fig. 1a

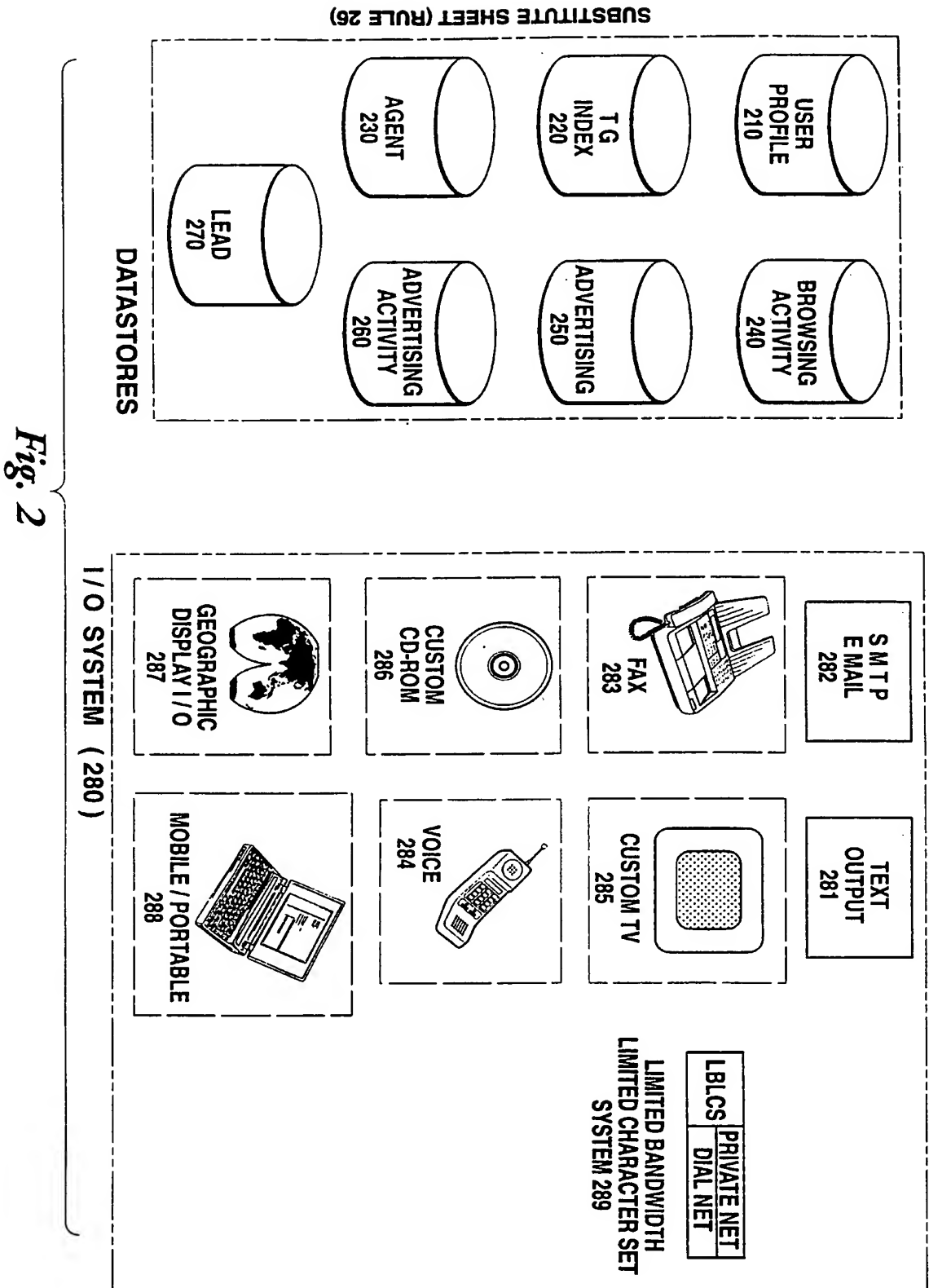
SUBSTITUTE SHEET (RULE 26)

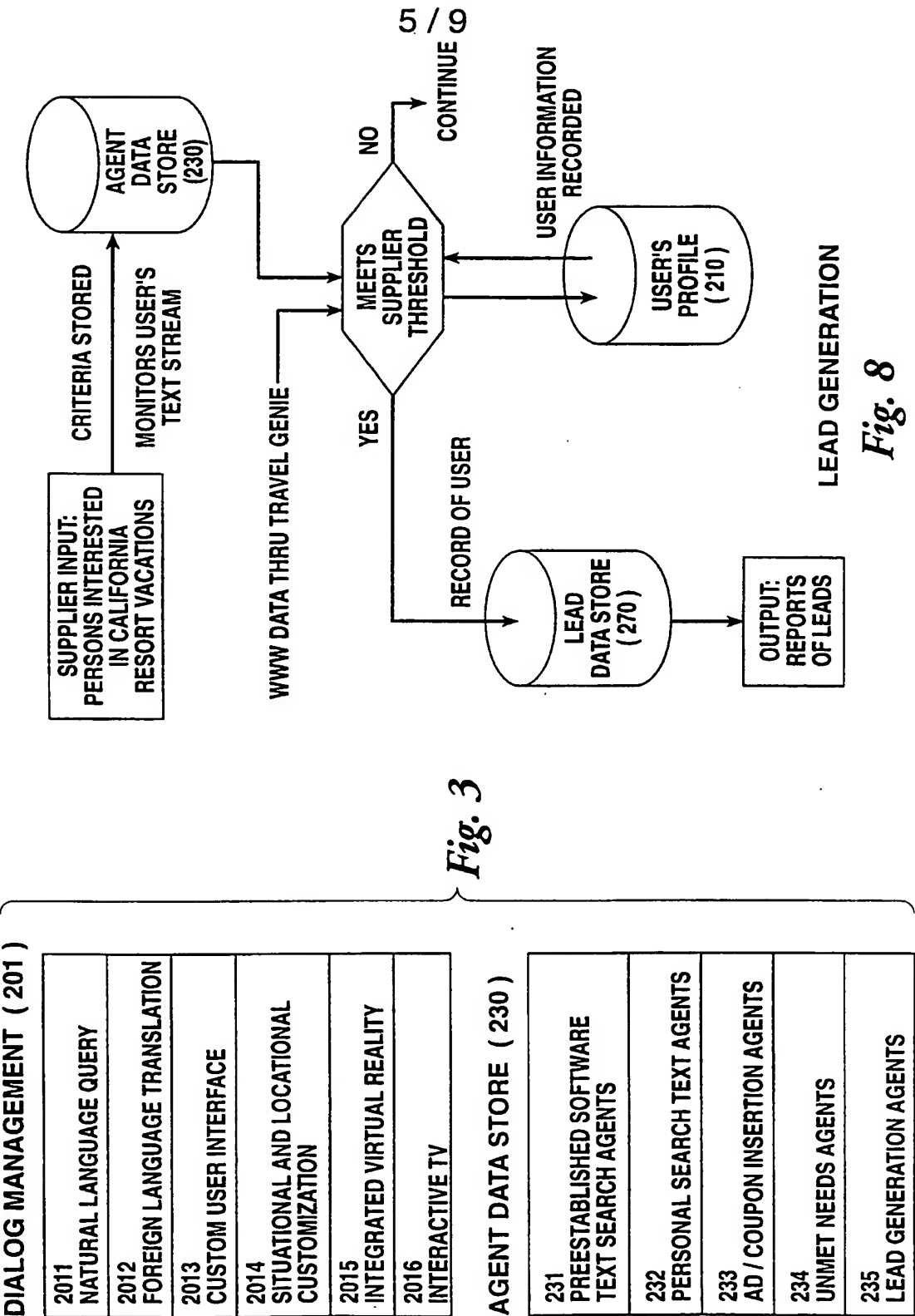


3 / 9



*Fig. 1b*



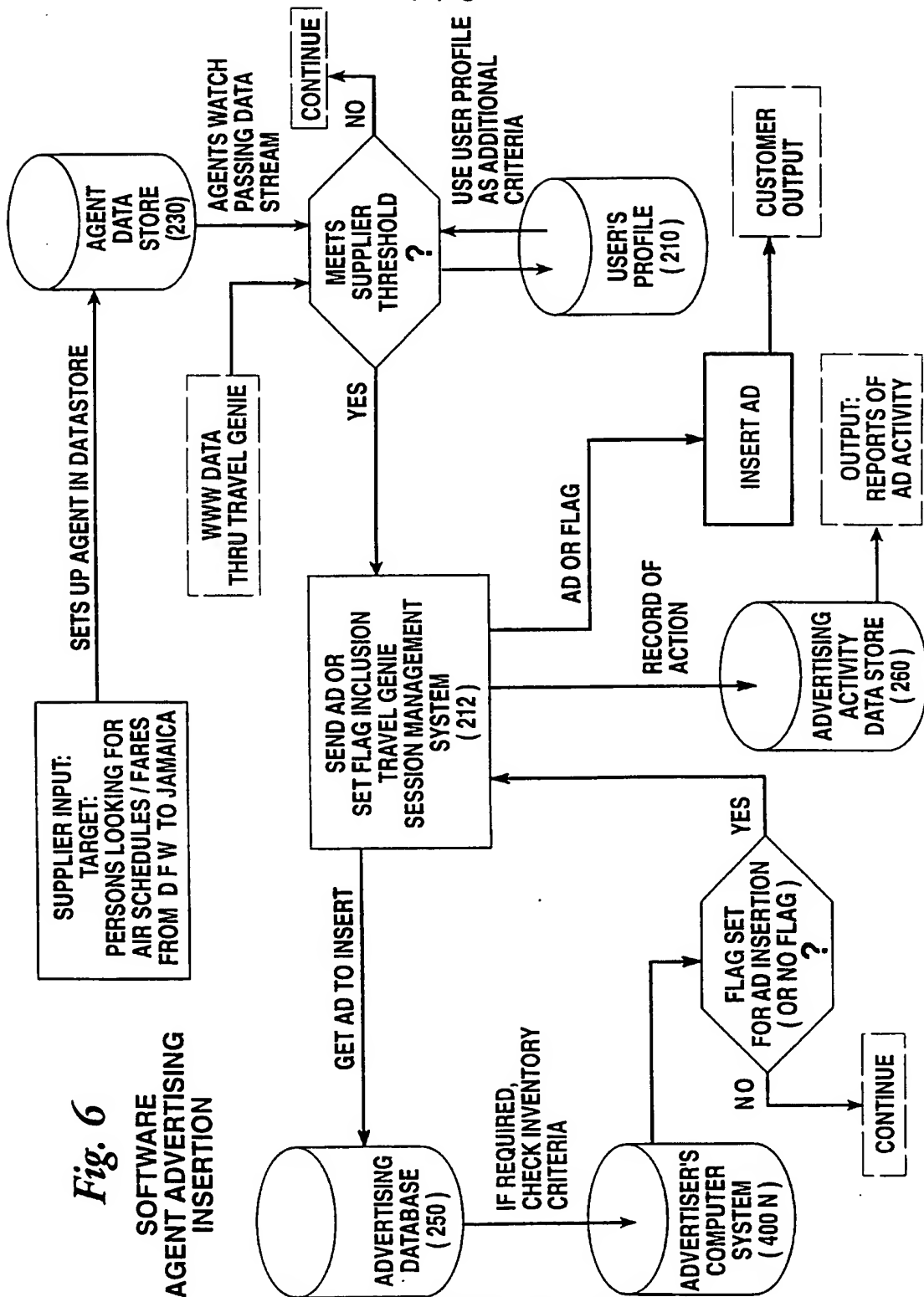


## OPERATIONS SYSTEM ( 290 )

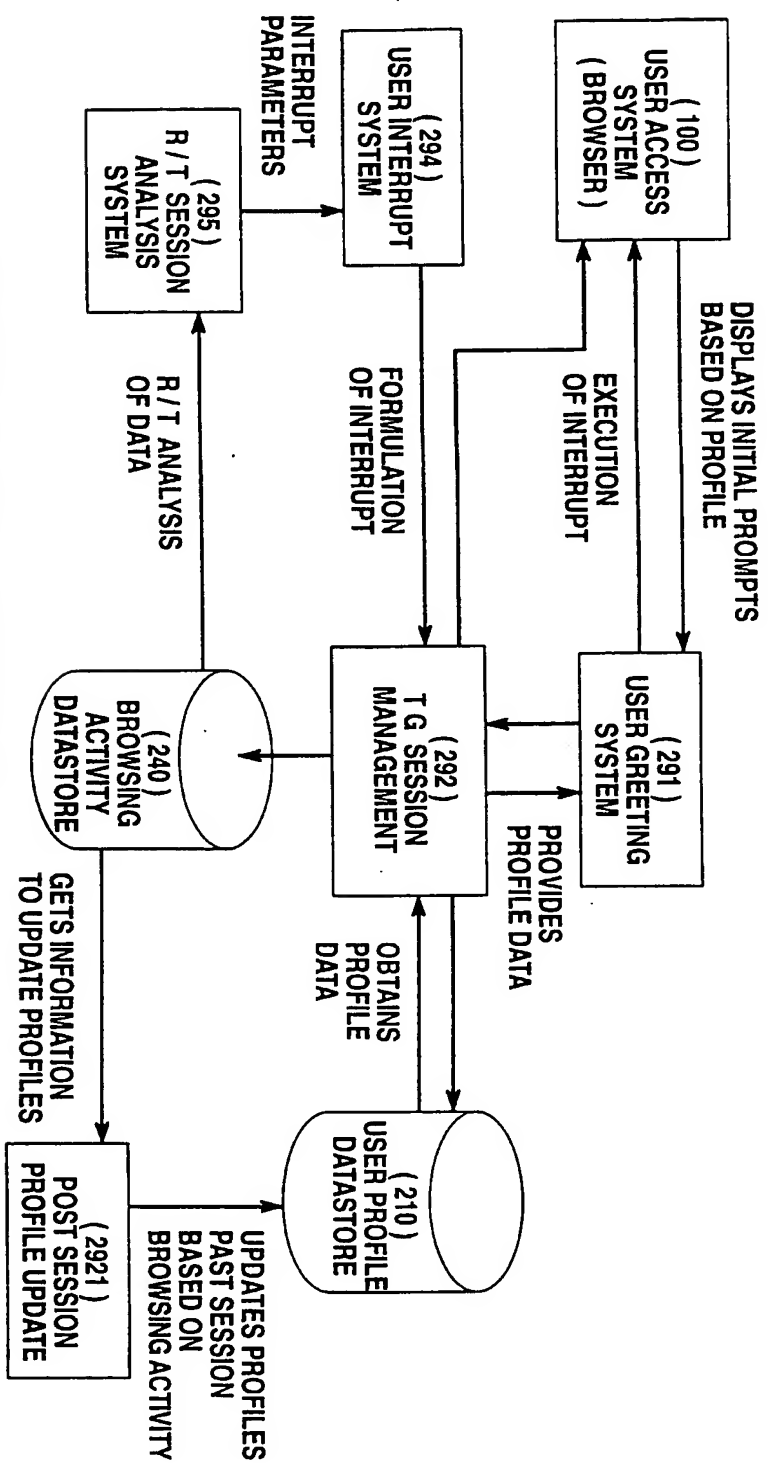
291	USER GREETING SYSTEM	
292	TG SESSION MANAGEMENT	2921 SESSION PROFILE UPDATE
	SEARCH REDUCTION SYSTEM	2931 SEARCH REDUCTION SYSTEM
		2932 PICTURE SEARCH SYSTEM
		2933 COLLABORATIVE DESTINATION ASSESSMENT
		2934 SMART INDEXES
		2935 SMART SEARCH
293	SEARCH REDUCTION SYSTEM	
294	USER INTERRUPT SYSTEM	
295	R / T SESSION ANALYSIS SYSTEM	
296	AD / COUPON INSERTION SYSTEM	2961 SMART ADS
297	PERSISTENT AGENT ENTRY	
298	DATA SUPPORT SYSTEMS	2981 DATA INDEXING SERVICE
		2982 DATA MONITORING SERVICE
299	UNMET NEEDS ANALYSIS SYSTEM	2991 REAL TIME MARKETPLACE

Fig. 4

7 / 9

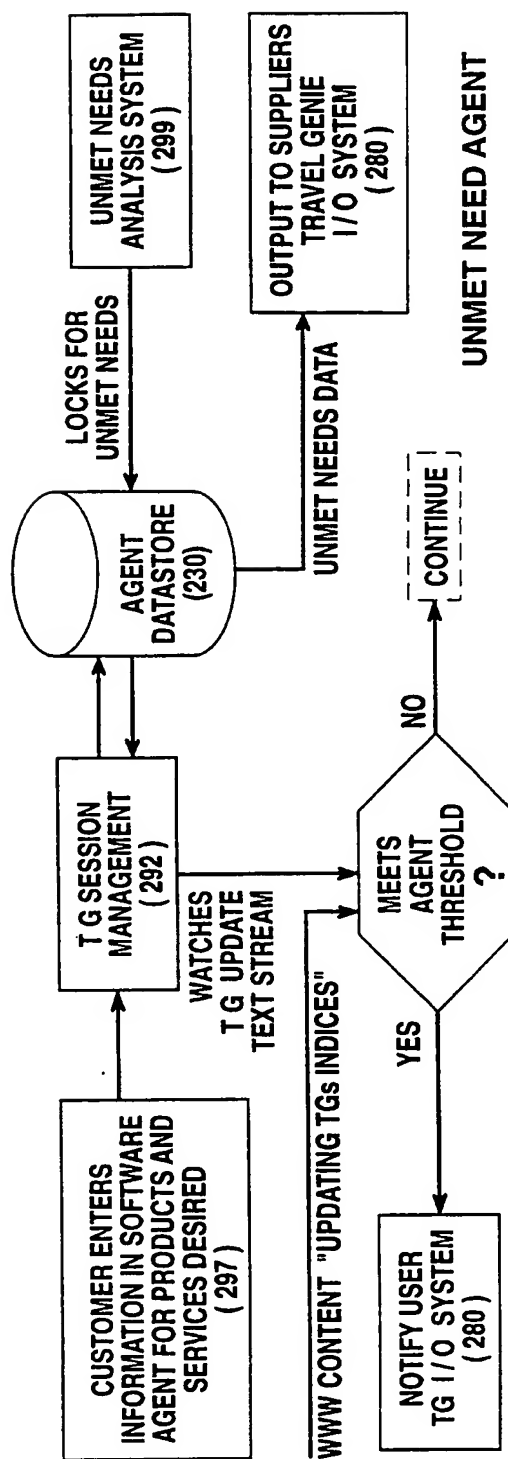
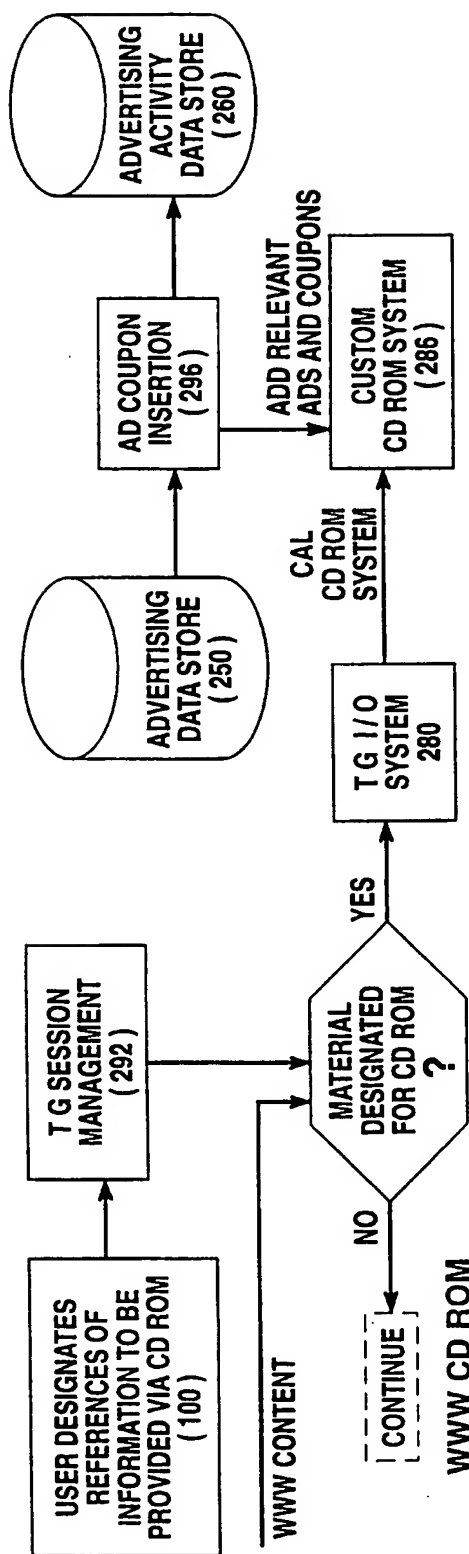


**Fig. 6**  
SOFTWARE  
AGENT ADVERTISING  
INSERTION



**Fig. 7**  
**AUTOMATED PROFILE GENERATION**

9 / 9





WORLD INTELLECTUAL PROPERTY ORGANIZATION  
International Bureau

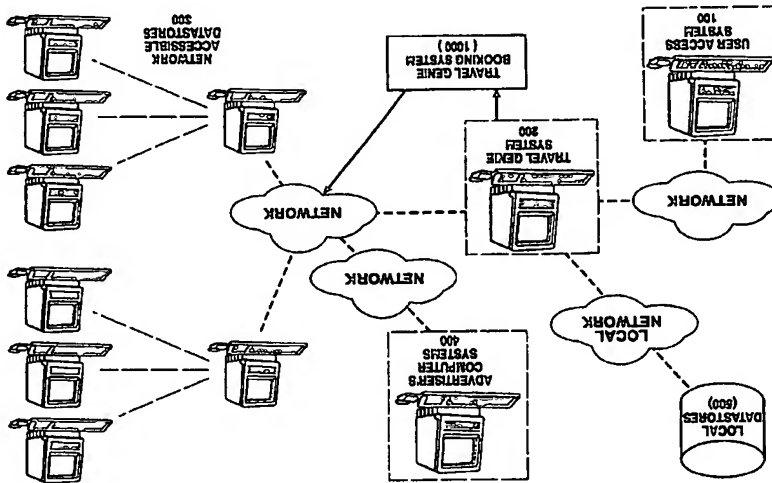
PCT

INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(51) International Patent Classification 6 : G06F 17/30, 17/60	A3	(11) International Publication Number: WO 98/35469 (43) International Publication Date: 13 August 1998 (13.08.98)
---	----	--

(21) International Application Number: PCT/US98/01341 (22) International Filing Date: 23 January 1998 (23.01.98) (30) Priority Data: 08/788,899 23 January 1997 (23.01.97) US (71) Applicant: THE SABRE GROUP, INC. [US/US]; 4255 Amon Carter Boulevard, Fort Worth, TX 76155 (US). (72) Inventors: BULL, David, Stanley; 4025 Timberidge Drive, Irving, TX 75038 (US). CARR, Robert, Neal, Jr.; 6620 Sunny Hill, Wauuga, TX 76148 (US). OFFUTT, Joseph, Robert, Jr.; 2758 Mesquite Lane, Grapevine, TX 76051 (US). (74) Agents: GARRETT, Arthur, S. et al.; Finnegan, Henderson, Farbrow, Garrett & Dunner, L.L.P., 1300 I Street, N.W., Washington, DC 20005-3315 (US).	
(81) Designated States: AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, CA, CH, CN, CU, CZ, DE, DK, EE, ES, FI, GB, GE, GH, GM, GW, HU, ID, IL, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MD, MG, MK, MN, MW, MX, NO, NZ, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TR, TT, UA, UG, UZ, VN, YU, ZW, ARIPPO patent (GH, GM, KE, IS, MW, SD, SZ, UG, ZW), European patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, CH, DE, DK, ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, ML, MR, NE, SN, TD, TG). Published With international search report. (88) Date of publication of the international search report: 29 October 1998 (29.10.98)	

(54) Title: INFORMATION AGGREGATION AND SYNTHESIZATION SYSTEM



(57) Abstract

An information aggregation and synthesization system and process (100). The present invention provides aggregation and packaging of structured or unstructured information from disparate sources such as those available on a network such as the Internet. A network compatible/addressable interface device is operated by a user (100). The network interface device (100) communicates with local (500) or network accessible datastores (300) via an addressing scheme such as Uniform Resource Locator addresses (URLs) utilized by the Internet. Data passing between the network interface device (100) and the datastores (300, 500) is accessed, polled and retrieved through an intermediary gateway system (200). Such aggregated information is then synthesized, customized, personalized and localized to meet the information resource requests specified by the user via the network interface device (100).



**FOR THE PURPOSES OF INFORMATION ONLY**

Codes used to identify States party to the PCT on the front pages of pamphlets publishing international applications under the PCT.

AL	Albania	ES	Spain	LS	Lesotho	SI	Slovenia
AM	Armenia	FI	Finland	LT	Lithuania	SK	Slovakia
AT	Austria	FR	France	LU	Luxembourg	SN	Senegal
AU	Australia	GA	Gabon	LV	Latvia	SZ	Swaziland
AZ	Azerbaijan	GB	United Kingdom	MC	Monaco	TD	Chad
BA	Bosnia and Herzegovina	GE	Georgia	MD	Republic of Moldova	TG	Togo
BB	Barbados	GH	Ghana	MG	Madagascar	TJ	Tajikistan
BE	Belgium	GN	Guinea	MK	The former Yugoslav Republic of Macedonia	TM	Turkmenistan
BF	Burkina Faso	GR	Greece			TR	Turkey
BG	Bulgaria	HU	Hungary	ML	Mali	TT	Trinidad and Tobago
BJ	Benin	IE	Ireland	MN	Mongolia	UA	Ukraine
BR	Brazil	IL	Israel	MR	Mauritania	UG	Uganda
BY	Belarus	IS	Iceland	MW	Malawi	US	United States of America
CA	Canada	IT	Italy	MX	Mexico	UZ	Uzbekistan
CF	Central African Republic	JP	Japan	NE	Niger	VN	Viet Nam
CG	Congo	KE	Kenya	NL	Netherlands	YU	Yugoslavia
CH	Switzerland	KG	Kyrgyzstan	NO	Norway	ZW	Zimbabwe
CI	Côte d'Ivoire	KP	Democratic People's Republic of Korea	NZ	New Zealand		
CM	Cameroon			PL	Poland		
CN	China	KR	Republic of Korea	PT	Portugal		
CU	Cuba	KZ	Kazakhstan	RO	Romania		
CZ	Czech Republic	LC	Saint Lucia	RU	Russian Federation		
DE	Germany	LI	Liechtenstein	SD	Sudan		
DK	Denmark	LK	Sri Lanka	SE	Sweden		
EE	Estonia	LR	Liberia	SG	Singapore		

## INTERNATIONAL SEARCH REPORT

International application No.

PCT/US98/01341

## A. CLASSIFICATION OF SUBJECT MATTER

IPC(6): G06F 17/30, 17/60  
US CL: Please See Extra Sheet.  
According to International Patent Classification (IPC) or to both national classification and IPC

## B. - FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)  
U.S.: Please See Extra Sheet.

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched  
Microsoft Press Computer Dictionary

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)  
APS, IEEE/EE Online Publications  
search terms: Internet, WWW, world wide web, gateway, coupon, ad, advertiser?, profile, implicit information

## C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X, P	US 5,623,652 A (VORA et al.) 22 April 1997, abstract, col. 5, lines 18-52	1-7
X, P	US 5,710,886 A (CHRISTENSEN et al) 20 January 1998, abstract, col. 8, line 42 through col. 9, line 44	8-11
Y, P	LITTLE, Thomas D.C., Commerce on the Internet, Multimedia at Work, 1994, pages 74-78	12-23
Y	AUBREY, David, Nomads of the Net (intelligent agents for data searching), Computer Shopper, v 15 n 12, p 616(4) December 1995, pages 1-8	12-18
T	US 5,740,549 A (REILLY et al.) 14 April 1998, abstract, col. 5	1-3

☒

Further documents are listed in the continuation of Box C.

☐

See patent family annex.

* Special categories of cited documents: "A" document defining the general state of the art which is not considered to be of particular relevance "B" earlier document published on or after the international filing date "L" document which may throw doubt on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified) "O" document referring to an oral disclosure, use, exhibition or other means "P" document published prior to the international filing date but later than the priority date claimed	"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention "X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone "Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art "A" document member of the same patent family
--	--

Date of the actual completion of the international search

16 JUNE 1998

Date of mailing of the international search report

20 AUG 1998

Name and mailing address of the ISA/US  
Commissioner of Patents and Trademarks  
Box PCT  
Washington, D.C. 20231

Facsimile No. (703) 305-3230

Authorized officer

PARSHOTAM LALL

Telephone No. (703) 305-9715

# INTERNATIONAL SEARCH REPORT

International application No.  
PCT/US98/01341

C (Continuation). DOCUMENTS CONSIDERED TO BE RELEVANT		
Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A,P	US 5,649,186 A (FERGUSON) 15 July 1997, abstract, col. 3	1-23
A	US 5,530,852 A (MESKE, JR. et al.) 25 June 1996, abstract	1-23
A	YUWONO et al., Search and Ranking Algorithms for Locating Resources on the World Wide Web, IEEE, 1996, pages 164-171	1-23

INTERNATIONAL SEARCH REPORT

International application No.  
PCT/US98/01341

Box I Observations where certain claims were found unsearchable (Continuation of item 1 of first sheet)

This international report has not been established in respect of certain claims under Article 17(2)(a) for the following reasons:

1. ☐ Claims Nos.: because they relate to subject matter not required to be searched by this Authority, namely:

2. ☐ Claims Nos.: because they relate to parts of the international application that do not comply with the prescribed requirements to such an extent that no meaningful international search can be carried out, specifically:

3. ☐ Claims Nos.: because they are dependent claims and are not drafted in accordance with the second and third sentences of Rule 6.4(a).

Box II Observations where unity of invention is lacking (Continuation of item 2 of first sheet)

This International Searching Authority found multiple inventions in this international application, as follows:

Please See Extra Sheet.

1. ☒ As all required additional search fees were timely paid by the applicant, this international search report covers all searchable claims.
2. ☐ As all searchable claims could be searched without effort justifying an additional fee, this Authority did not invite payment of any additional fee.
3. ☐ As only some of the required additional search fees were timely paid by the applicant, this international search report covers only those claims for which fees were paid, specifically claims Nos.:

4. ☐ No required additional search fees were timely paid by the applicant. Consequently, this international search report is restricted to the invention first mentioned in the claims; it is covered by claims Nos.:

Remark on Protest ☐ The additional search fees were accompanied by the applicant's protest.  
☒ No protest accompanied the payment of additional search fees.

# INTERNATIONAL SEARCH REPORT

International application No.  
PCT/US98/01341

## A. CLASSIFICATION OF SUBJECT MATTER:

US CL :

705/14, 705/26; 707/10, 501; 395/200.36, 395/200.47 395/200.48, 395/200.49

## B. FIELDS SEARCHED

Minimum documentation searched

Classification System: U.S.

705/14, 705/26; 707/10; 395/200.47 395/200.48, 395/200.49

## BOX II. OBSERVATIONS WHERE UNITY OF INVENTION WAS LACKING

This ISA found multiple inventions as follows:

This application contains the following inventions or groups of inventions which are not so linked as to form a single inventive concept under PCT Rule 13.1. In order for all inventions to be searched, the appropriate additional search fees must be paid.

Group I, claim(s) 1-7, drawn to accessing, retrieving, and processing data passing between a network communication device and databases through an intermediary gateway.

Group II, claim(s) 8-23, drawn to using software agents to develop implicit and explicit user information profiles to distribute electronic coupons.

The inventions listed as Groups I and II do not relate to a single inventive concept under PCT Rule 13.1 because, under PCT Rule 13.2, they lack the same or corresponding special technical features for the following reasons:

Invention I has separate utility as a process for accessing, retrieving and processing data through an intermediary gateway without the software agents of invention II; and

Invention II has separate utility as a process for using software agents to generate user profiles from implicit and explicit information without the intermediary gateway of invention I.

THIS PAGE BLANK (USPTO)